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UDAAN User Manual – South and East CDR Zones

May 2015



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About this Manual

This manual provides the overview of the CRM Lead Management UDAAN CR and the tasks performed to complete the defined business scenarios.

Purpose

This manual has been written to help BSNL users understand and use the Lead Management process flows. It presents the functional capabilities and operational details of Lead Management that users should know for performing business tasks using CRM Lead Management. Additionally, this manual provides information creation of Lead in three different ways.

Intended Audience

This manual is intended for the use of BSNL personnel.

Prerequisites

Following are the prerequisites for performing the tasks presented in this manual:

Functional	Basic functional knowledge of the services provided by BSNL
Technical	<ul style="list-style-type: none"> • Basic knowledge of Siebel application • Should have attended CDR training conducted for CSRs

Typographical Conventions

The following table gives the details of the typographical conventions used in the document:

Typographical Conventions

Formatting Convention	Type of Information
Title Case & Bold	All the buttons used in the application are written in Title Case & Bold font. For example, Click Submit Order
<i>Italics</i>	All the error messages, alerts, status of the fields and values are written in <i>Italics</i> . For example, A message, <i>Validations Successful</i> , appears
Field Names	All the field names in this document are written in Title Case. For example, The Account Name field is a hyperlink
User-entered text	Text that you enter appears in Arial font

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1. Introduction

This chapter provides an introduction to the CRM Lead Management - UDAAN

1.1. Purpose of UDAAN

BSNL has launched UDAAN project to capture the leads for various services. Sales team in each SSA will be responsible for capturing the leads and converting them to BSNL Customers. CDR systems are now ready to support UDAAN project requirements.

1.2. Features of UDAAN

Following Lead management activities for Landline, Broadband, ISDN and FTTH are supported:

- Lead Creation through following channel of approach :
 1. Walk-in
 2. BSNL Sales Agent
 3. Call Center
 4. Franchisee
- Lead Creation Through WSC login
- Lead Creation through channel of approach as SMS and Internet (WSC Portal)

1.3. CRM Application Environment

This section describes the software and hardware environment required to run CRM Application.

1.3.1. Software Environment

Operating System	Microsoft Windows XP Professional SP2 or above
Database	NA
Server Software(s)	NA
Other Software(s)	Internet Explorer 6.28 and above

1.3.2. Hardware Environment

Servers	NA
Network Infrastructure	The desktop should be in BSNL intranet
Communication Infrastructure	NA
Other Hardware	NA

1.4. CRM Modules used in UDAAN flows

Following 7 modules of CRM application are being used for UDAAN based Leads and Order management are:

- Contacts
- Customer Accounts
- Billing Accounts
- Orders
- Lead Management
- Pre Lead Management
- Franchisee

1.5. User Roles

- Call center CSR
- CSC CSR
- Sales Team Lead
- WSC CSR
- SMS CSR

2. Getting Started

2.1. Lead Creation for new customer

To create a new lead for a new customer, following steps should be followed -

1. Create a new Customer in Customer Account.
2. Add his/her contact details under Contact View.
3. Add his address, installation as well as billing address under Address View.
4. Then create a new lead under Leads View.

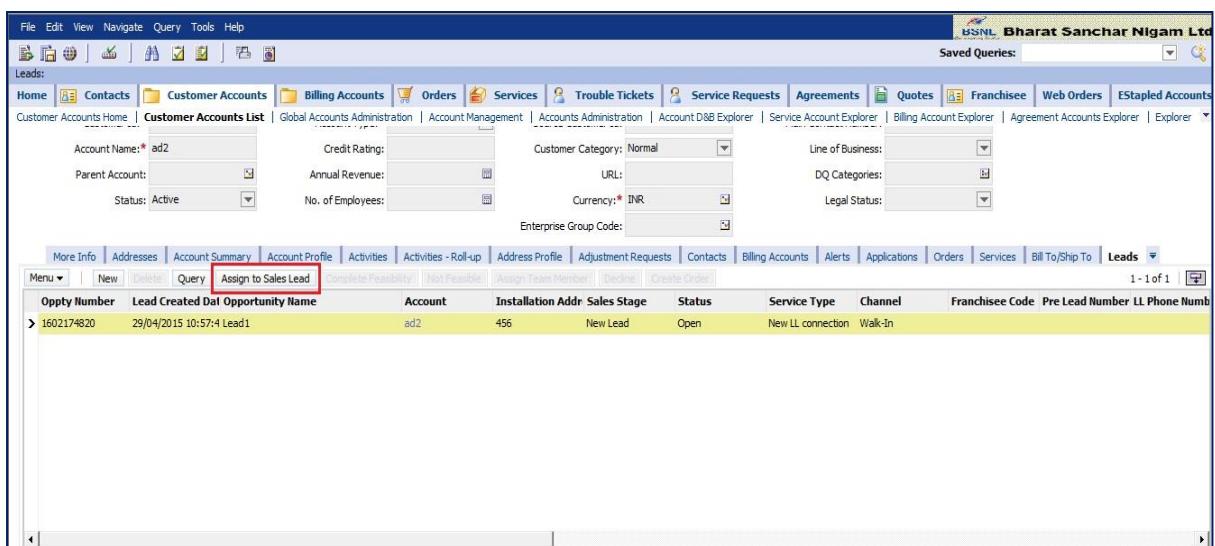
A screenshot of Lead View is given below -

5. Create a new lead by clicking on **New** Button. A new record will be generated.

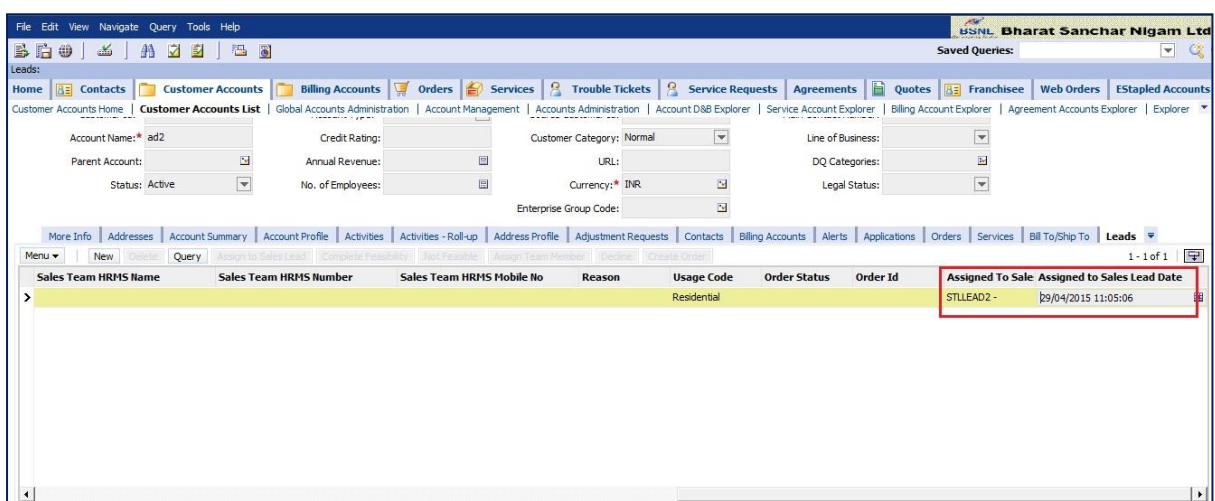
A screenshot of Lead Creation is given below -

6. Enter Opportunity Name.
7. Select the installation address from pick applet.
8. Select the service type.
9. Channel can be BSNL Sales Agent, Walk-in, Call Centre, Franchisee
10. In case, the channel chosen is Franchisee, Franchisee code has to be selected.
11. LL Phone Number field is mandatory for taking new Broadband, Prepaid BB or VPN connection.
12. Click on **Assign to Sales Lead**

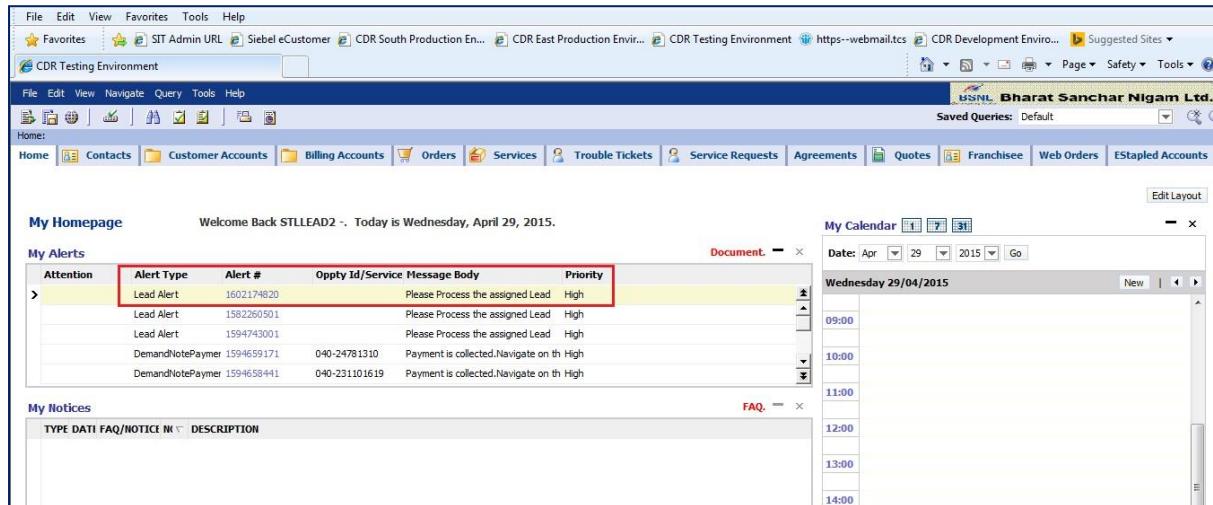
A screenshot on clicking on Assign to Sales Lead.



Screenshot after clicking on Assign to Sales Lead

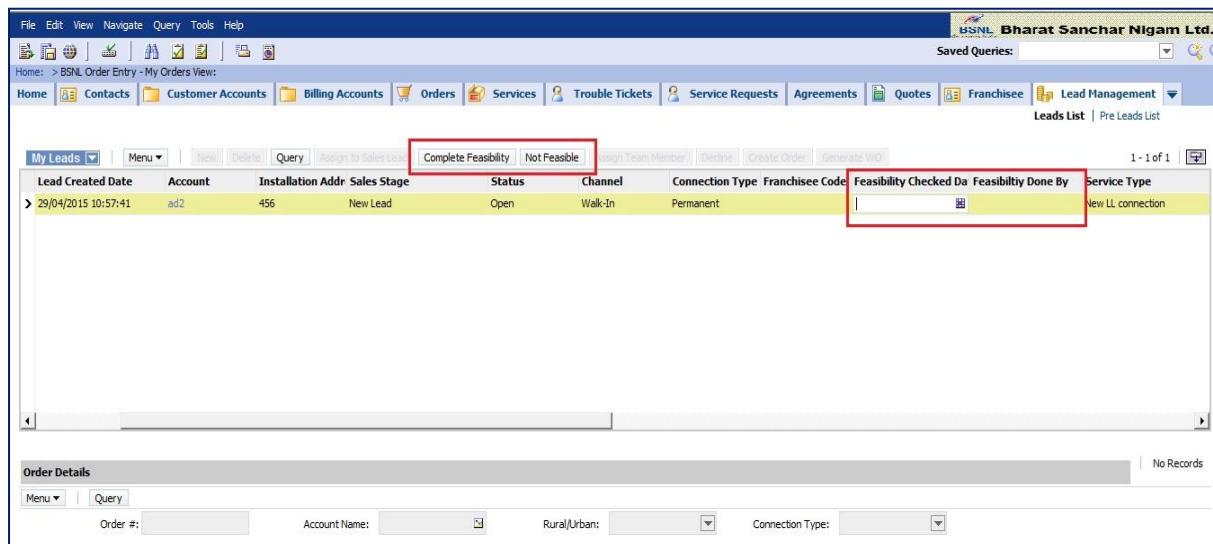


13. It gets assigned to a Sales Lead mapped at SSA level.
14. Login through the Sales Lead credentials.
15. An automatic alert will be generated on his home page in alert applet.

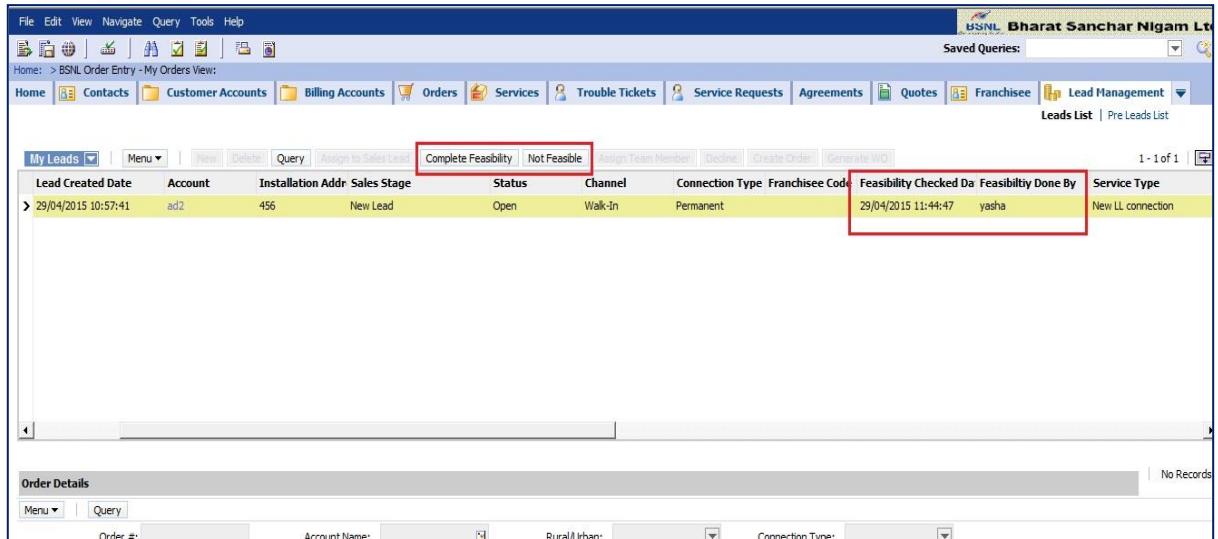


16. On clicking on Alert#, it will redirect him to Lead Management Screen → My Leads View.

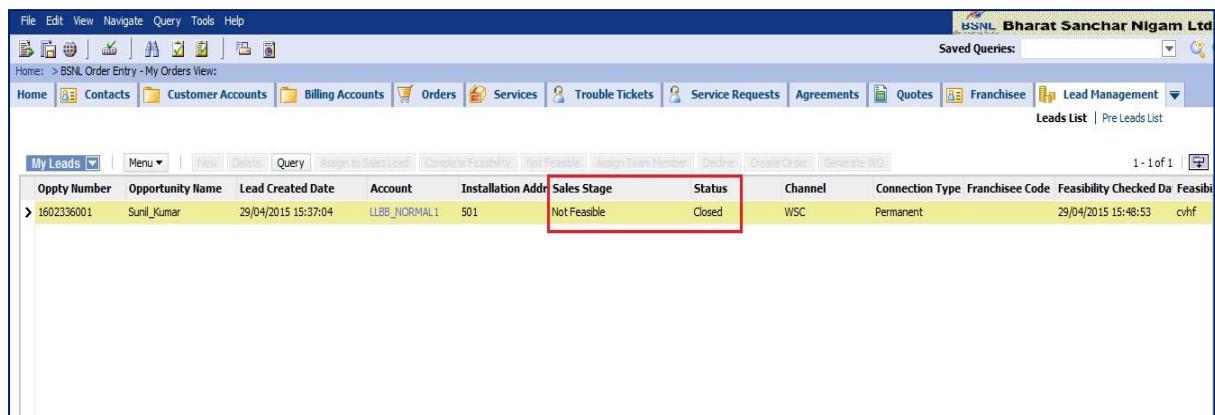
Screenshot of Lead Management Screen.



17. STL gets feasibility check done by JTO outside CRM system. With the received information, STL enters the "Feasibility Checked Date" and "Feasibility Done By" fields and clicks on **Complete Feasibility** button.



18. If the connection is not feasible, STL clicks on Not Feasible button, and thus the Sales Stage changes to Not Feasible and status changes to Closed.



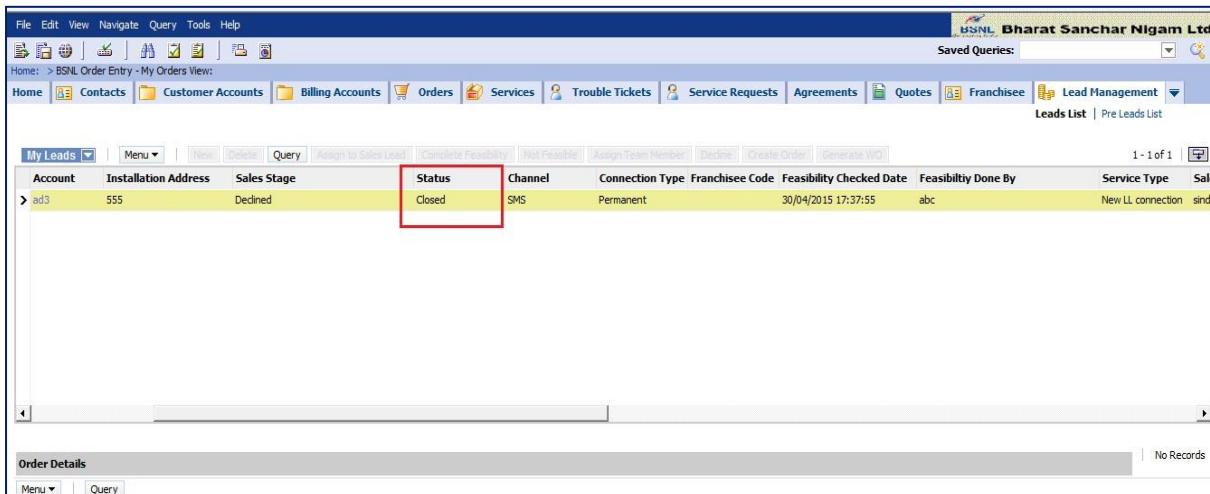
19. After positive feasibility, STL assigns the lead to Sales team member under him by picking a value from the field "Sales HRMS Name". "Sales HRMS Number" and "Sales HRMS Mobile Number" fields will be autopopulated as per STM information stored in CRM. STL then clicks on "Assign Team Member" button

The screenshot shows a software interface for managing leads and orders. At the top, there's a menu bar with File, Edit, View, Navigate, Query, Tools, Help, and various icons. The title bar says "BSNL Bharat Sanchar Nigam Ltd." and "Saved Queries:". Below the menu, a toolbar has buttons for Home, Contacts, Customer Accounts, Billing Accounts, Orders, Services, Trouble Tickets, Service Requests, Agreements, Quotes, Franchisee, Lead Management, Leads List, and Pre Leads List. A sub-menu "My Leads" is open. The main area displays a table of leads. One row is highlighted with a red border, showing columns: Feasibility Checked Da (29/04/2015 11:44:47), Feasibility Done By (yasha), Service Type (New LL connection), Sales HRMS Name (lead1), Sales HRMS Number (8555678), Sales HRMS Mobile No (9876985501), and Pre Lead Number (LL Phone Number Reason). Below the table is an "Order Details" section with a search bar and dropdown filters for Order #, Account Name, Rural/Urbn, Connection Type, Order Type, Contract Name, Status, and Order Date.

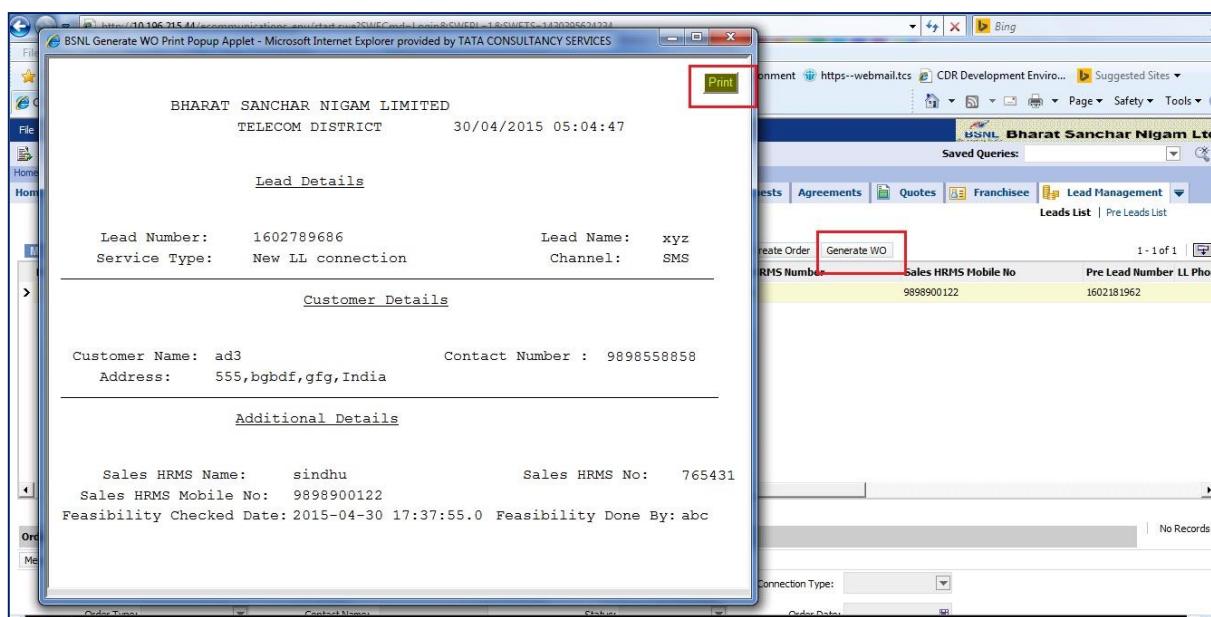
20. After it gets assigned to Team Member, he manually collects CAF and payment from Customer. STL can now proceed with Order Creation by clicking on **Create Order** button.

This screenshot is similar to the previous one but shows the "Create Order" button in the header of the lead table highlighted with a red border. The rest of the interface and data are identical to the first screenshot.

21. If Customer is not interested and conveys the same to STM, STL can click on **Decline** button, lead Status changes to Closed.



22. If we click on **Generate WO** button, a jsp page is invoked, which gives customer, lead and other additional details. This way the Sales Lead gets to know the customer's detail and may contact him for any information.



23. If we click on **Create Order** button, it redirects us to Order Page.
24. At this point order is created only if at least one Billing account exists under Customer account. If not, an error message will be thrown and STL has to create a new billing account for the customer under Billing Account View.

This screenshot shows the UDAAN Order Entry interface. At the top, there's a menu bar with File, Edit, View, Navigate, Query, Tools, Help, and a toolbar with various icons. Below the toolbar is a navigation bar with Home, Contacts, Customer Accounts, Billing Accounts, Orders, Services, Trouble Tickets, Service Requests, Agreements, Quotes, Franchisee, Lead Management, and a link to BSNL Bharat Sanchar Nigam. A saved queries dropdown is also present. The main area displays an order with ID 1602789431. The form includes fields for Order Number, Offline Order, Service Line, Preferred Number, Indoor Completion Date, Order Created On, Order Id, Service Type, Nearest BSNL Landline Number, Customer Requested Date, Order Sub Type, Service Sub Type, Service Category, Usage Code, Installation Exchange Type, Order Closed Date, Account Name, Billing Account, Installation Address, Contact Surname, Connection Type, Status, Provision Date, Total Amount, Amount Paid, Receipt Number, Documents To Be Collected, Sales Channel, Centrex/ISDN Group Id, IP Centrex Group Id, Billing Redirect Account, PRBT Disconnection Date, Sub Status, Accessory Receipt Number, Prepaid Voucher Id, Transfer Across Zone, TNF Flag, and Broadband Required. Buttons at the bottom include More Info, ISDN Group, Activities, Milestones, Parent Orders, Child Orders, Cancelled Orders, Waitlist Orders, Address, Billing Account, Demand Note, and Line Items.

25. To differentiate UDAAN Order with other orders, in More Info tab, value of UDAAN Flag is "Y".

This screenshot shows the BSNL Order Entry interface. At the top, there's a menu bar with File, Edit, View, Navigate, Query, Tools, Help, and a toolbar with various icons. Below the toolbar is a navigation bar with Home, Escalations, Order List, Broadband, WILL Prepaid, IPTV Prepaid, EPABX Broadband, DSPT, IN, FTTH Voice, FTTH Broadband, DSPT BB, MMVC, and a link to BSNL Bharat Sanchar Nigam Ltd. A saved queries dropdown is also present. The main area displays an order with ID ad2. The form includes fields for Account Name, House No/Flat No, Village Name/Colony Name, City/Mandal, Number Type, SSA, District, State, Circle, Country, Postal Code, Contact Name, and Installation Exchange Type. A 'Centrex/ISDN Group Details' section contains fields for Centrex/ISDN Group Id, Centrex/ISDN Group Name, Centrex Free Connections, Short Dial Number, CUG Group Id, IP Centrex Group Id, and IP Centrex Group Name. A 'Referral Details' section contains fields for Referral Source and Referred By. A 'Comments' field has a red box around the 'Udaan Flag: Y' entry. Other sections include 'Other Details' (Order Submission Date, Order Cancelled By, Nature of Shift, Currency Code, Accessory Collected Status, Bank Guarantee Number, Modem Accessory Collected Status, Comments From Downstream) and 'Internal Wiring Required' (checkbox). Buttons at the bottom include Udaan Flag, Comments, and OK/Cancel.

26. After adding Line Items, choosing required plans, facilities, accessories, etc, we click on Available Numbers button.

This screenshot shows the UDAAN Order Entry interface. At the top, there's a menu bar with File, Edit, View, Navigate, Query, Tools, Help, and a toolbar with various icons. Below the toolbar is a navigation bar with Home, Escalations, Order List, Broadband, WILL Prepaid, IPTV Prepaid, EPABX Broadband, DSPT, IN, FTTH Voice, FTTH Broadband, DSPT BB, MMVC, and a link to BSNL Bharat Sanchar Nigam Ltd. A saved queries dropdown is also present. The main area displays an order with ID 1602789431. The form includes fields for Order Number, Offline Order, Service Line, Preferred Number, Indoor Completion Date, Order Created On, Order Id, Service Type, Nearest BSNL Landline Number, Customer Requested Date, Order Closed Date, Provision Date, Total Amount, Amount Paid, Receipt Number, Documents To Be Collected, Sales Channel, Centrex/ISDN Group Id, IP Centrex Group Id, Billing Redirect Account, PRBT Disconnection Date, Sub Status, Accessory Receipt Number, Prepaid Voucher Id, Transfer Across Zone, TNF Flag, and Broadband Required. A 'Available Numbers - Microsoft Internet' dialog box is open, showing a list of telephone numbers (e.g., 040-24781231, 040-24781225, 040-2560082, 08415-251223, 040-24781235, 040-231101630, 040-23221875, 040-24781306, 08415-251228, 040-24781232) with an 'OK' and 'Cancel' button. Buttons at the bottom include More Info, ISDN Group, Activities, Milestones, Parent Orders, Child Orders, Cancelled Orders, Waitlist Orders, Address, Billing Account, Demand Note, and Line Items.

File Edit View Navigate Query Tools Help

File Edit View Navigate Query Tools Help

Home > Order:

Home Contacts Customer Accounts Billing Accounts Orders Services Trouble Tickets Service Requests Agreements Quotes Franchisee Web Orders Sales Orders

1602789431

Menu New Cancel Copy Order Available Numbers Reserve Number Accessory Check Validate Demand Note Balance Deduction Submit Order

Order Number: 1602789431 Order Created On: 30/04/2015 16:26:10

Order Id: 1-9YVAV Order Date: 30/04/2015 16:26:10

Order Type: New Customer Requested Date: 07/05/2015 16:26:10

Order Sub Type: Provision Order Closed Date:

Account Name: ad5 Provision Date:

Billing Account: 9000085778 Total Amount:

Installation Address: 111 Amount Paid:

Contact Surname: dd Receipt Number:

Contact Name: df& Sub Status: Validation Successful

Documents To Be Collected: None Accessory Receipt Number:

Franchisee Code: Centrex/ISDN Group Id: Prepaid Voucher Id:

Corporate Id: Immediate Bill: IP Centrex Group Id: Transfer Across Zone: TNF Flag:

Billing Redirect Type: Billing Redirect Account: Broadband Required: N

PRBT Disconnection Date:

More Info ISDN Group Activities Milestones Parent Orders Child Orders Cancelled Orders Waitlist Orders Address Billing Account Demand Note Line Items

Contact Surname: dd Connection Type: Permanent Status: Open Receipt Number:

Contact Name: df& No Of Days: Sub Status: Number Available Accessory Receipt Number:

Documents To Be Collected: None Sales Channel: Internet Centrex/ISDN Group Id: Prepaid Voucher Id:

Franchisee Code: Immediate Bill: IP Centrex Group Id: Transfer Across Zone: TNF Flag:

Corporate Id: Billing Redirect Type: Billing Redirect Account: Broadband Required: N

PRBT Disconnection Date:

More Info ISDN Group Activities Milestones Parent Orders Child Orders Cancelled Orders Waitlist Orders Address Billing Account Demand Note Line Items

27. After choosing the required number from the pop up window of Available numbers, Order Sub status changes to **Number Available**. Then click on **Reserve Number** button.

File Edit View Navigate Query Tools Help

File Edit View Navigate Query Tools Help

Home > Order:

Home Escalations Order List Broadband WLL Prepaid IPTV Prepaid EPABX Broadband DSPT IN FTTH Voice FTTH BroadBand DSPT BB MMVC

1602789431

Menu New Cancel Copy Order Available Numbers Reserve Number Accessory Check Validate Demand Note Balance Deduction Submit Order

Order Number: 1602789431 Indoor Completion Date: 040-24781231 Order Created On: 30/04/2015 16:26:10

Order Id: 1-9YVAV Service Id (Ph #): 040-24781231 Order Date: 30/04/2015 16:26:10

Order Type: New Preferred Number: Customer Requested Date: 07/05/2015 16:26:10

Order Sub Type: Provision Nearest BSNL Landline Number: Order Closed Date:

Account Name: ad5 Service Type: Landline CH Pilot No(Reference #): Provision Date:

Billing Account: 9000085778 Service Sub Type: Fixed Landline Billing Exchange Type: Urban Total Amount:

Installation Address: 111 Usage Code: Residential Installation Exchange Type: Urban Amount Paid:

Contact Surname: dd Connection Type: Permanent Status: Open Receipt Number:

Contact Name: df& No Of Days: Sub Status: Port Available Accessory Receipt Number:

Documents To Be Collected: None Sales Channel: Internet Centrex/ISDN Group Id: Prepaid Voucher Id:

Franchisee Code: Immediate Bill: IP Centrex Group Id: Transfer Across Zone: TNF Flag:

Corporate Id: Billing Redirect Type: Billing Redirect Account: Broadband Required: N

PRBT Disconnection Date:

More Info ISDN Group Activities Milestones Parent Orders Child Orders Cancelled Orders Waitlist Orders Address Billing Account Demand Note Line Items

28. Now the order sub status changes to **Port Available**. Now click on **Accessory Check** button.

29. After clicking on Accessory Check button, order sub status changes to **Accessories Check Done**. Now click on **Validate** button.

30. After successful validations, order substatus changes to **Validation Successful**. Now click on **Demand Note** button.

31. After making demand note from PMS, click on Submit button.

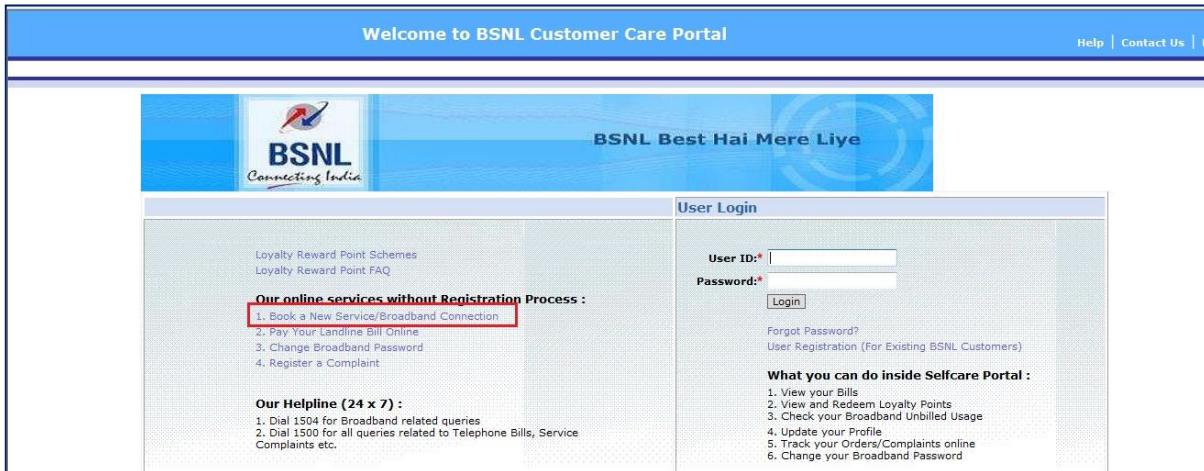
32. Once the order is submitted, substatus changes to Submission In Progress and after hitting to Clarity, it changes to In Progress.
33. After order is completed in Clarity, check in Lead Management Screen. Sales Stage of the Lead is Order Closed.

2.2. Lead Creation for existing customer

1. This section tells user how to create a lead for existing BSNL Customer.
2. Since the customer is existing, customer account, contact details, address, billing account will already be existing for the customer.
3. We can directly go to Leads View and create a new lead by clicking on New button. Add the mandatory details, choose the Channel and assign to Sales Lead.
4. Login through the assigned Sales Lead, click on the alert that redirects to Lead Management Screen.
5. Check for feasibility, fill mandatory columns like Feasibility Checked Date, Feasibility Done by and click on Complete Feasibility.
6. By entering Sales HRMS Name, Number and Mobile Number, click on Assign Team Member.
7. Once it is assigned to Team Member, we can click on Create Order to proceed with the creation of Order.
8. Then the normal order flow follows.

2.3. Lead Creation When Channel is Internet (through WSC main page, without login)

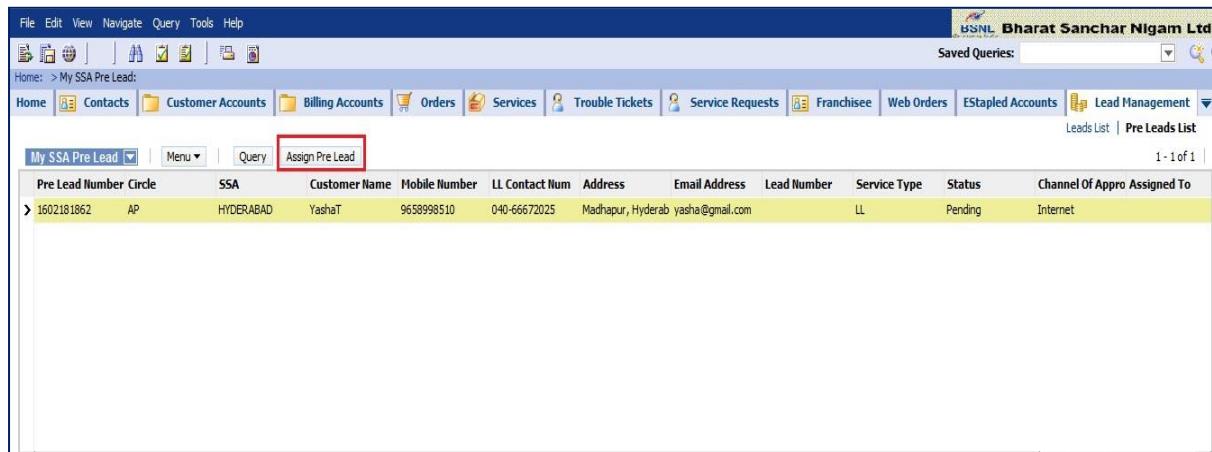
1. Go to eCustomer application giving the URL, and click on Book a New Service/Broadband Connection.



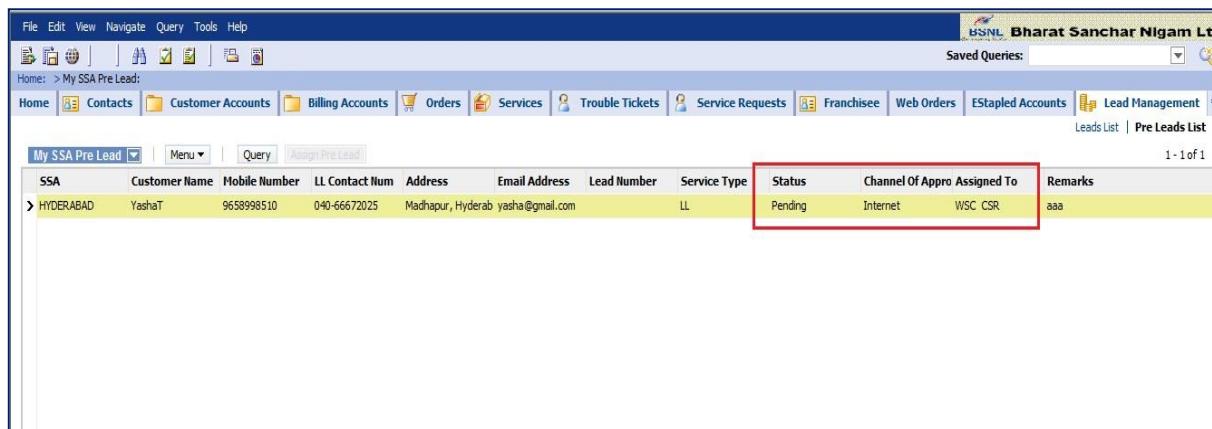
2. The above link redirects to registration page. Fill in the mandatory details and click on Submit.

Circle :*	AP
SSA :*	HYDERABAD
Customer Name:*	YashaT
Mobile Number*	9658998510
Land Line Contact No	STD Code - Number 040 66672025 Example: 040 25262321
Email Address:	yasha@gmail.com Example: abcd@gmail.com
Service Type:*	Landline
Address:*	Madhapur, Hyderabad
Remarks:	aaaa enter address without any special characters

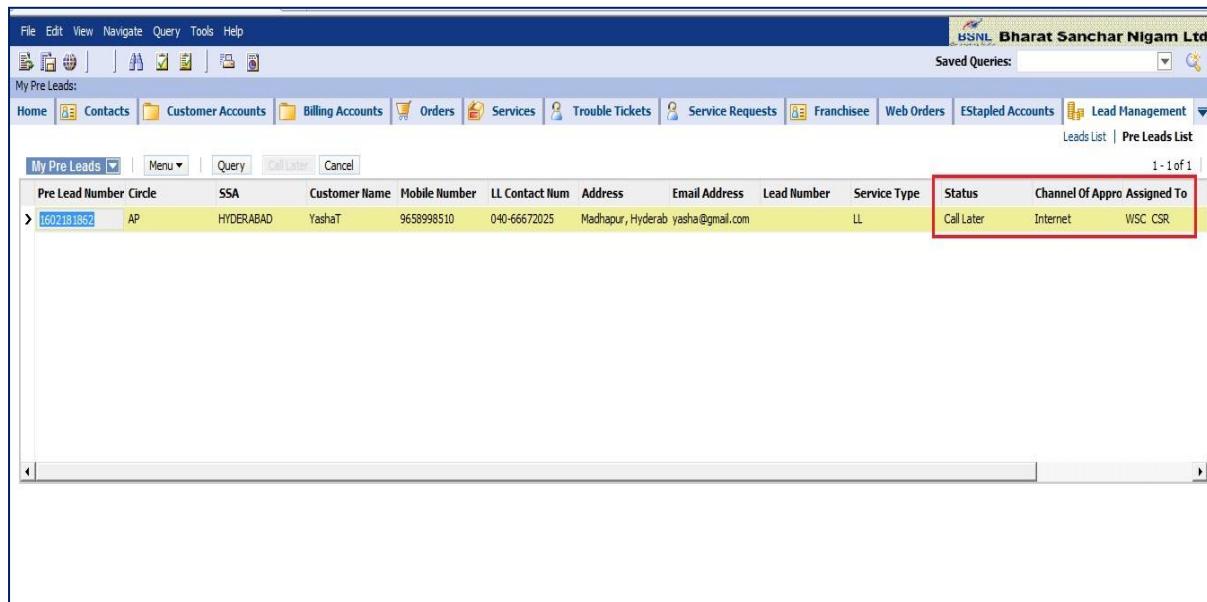
3. In Siebel Application, login through WSCCSR login. On his home page, an automated alert will be generated which leads to Lead Management Screen, Pre Lead List View.



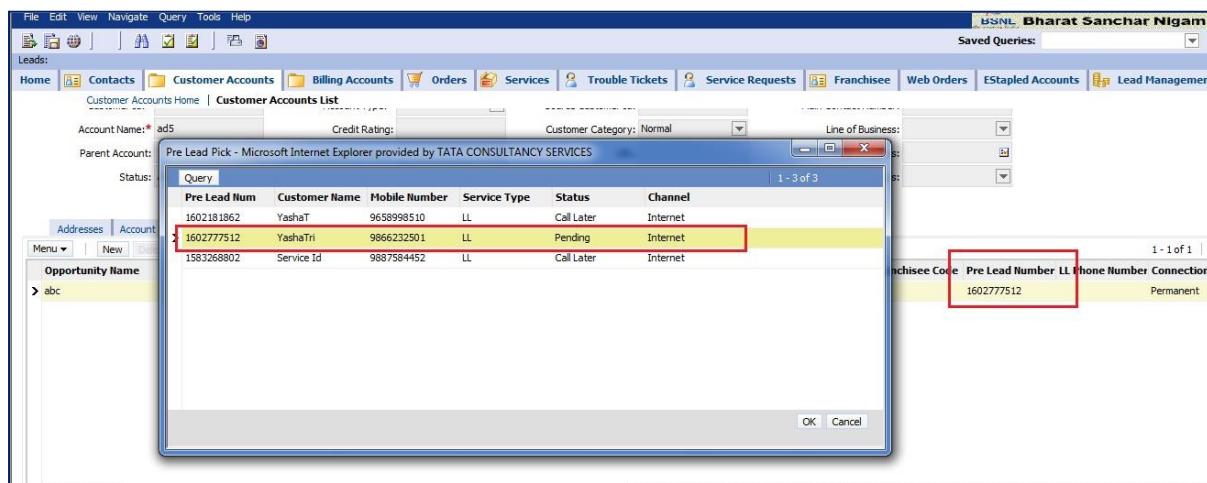
- In My SSA Pre Lead Applet, click on **Assign Pre Lead**. It will be assigned to himself and then the record can be seen in My Pre Lead Applet. Channel of Approach is Internet and Status changes to Pending.



- In My Pre Lead Applet, the pre lead can opt for an option of Call Later. Thus the status changes to Call Later.



6. The Sales Lead will call the customer and ask whether he is a new customer or existing. In Case of new customer, he will create a new Customer Account, add Address, Billing Account and Go To Leads Applet. In Case of existing customer, he can directly go to Leads Applet and create a new Lead. Channel is WSC (Internet), so pick Pre Lead which was created now.



7. After picking Pre Lead associated to that lead, click on Assign to Sales Lead like other cases.
 8. Now the Pre Lead status in Pre Lead Applet changes to Converted to Lead.

Circle	SSA	Customer Name	Mobile Number	LL Contact Num	Address	Email Address	Lead Number	Service Type	Status	Channel Of Appro	Assigned To	Remark
AP	HYDERABAD	YashaTri	9866232501	040-66672125	Madhapur, Hyd	y.trive@gmail.com	1602789422	LL	Converted to Lead	Internet	WSC CSR	nil

9. Once the opportunity is assigned to Sales Lead, then same steps are followed like in above case.
10. After the Order is created and it normally flows as other orders.

2.4. Lead Creation When Channel is SMS

When the end user sends an SMS requesting for the service, an alert goes to SMSCSR of the Circle same like alerts for others. This alert redirects him to Pre Lead Applet.

Pre Lead Number	Circle	SSA	Customer Name	Mobile Number	LL Contact Num	Address	Email Address	Lead Number	Service Type	Status	Channel Of Appro	Assigned To
1602181962	AP	9698989899							LL	Pending	SMS	

1. Under All Circle Pre Lead, the record will be displayed. Channel of Approach will be SMS.
2. Click on Assign Pre Lead. The record will be assigned to himself and can be seen under My Pre Lead Applet.
3. Now, if the customer is existing or new, we need to proceed accordingly like in the above cases.

4. Go to Leads Applet under Customer Account. Fill in the mandatory details after clicking on **New** button.
5. Here Pre Lead Number is a mandatory field. Only those pre leads will appear in the applet which are having status as Pending or Call Later.
6. Here Channel will come as SMS.
7. Click on Assign to Sales Lead and thus the record gets assigned to Sales Lead according to the respective circle.
8. After this, login through the Assigned Sales Leads Credentials and click on Alerts on his home page, which redirects him to Lead Management Screen.
9. Then the same steps follows like in other cases.

Opty Number	Lead Created Date	Opportunity Name	Account	Installation Addr	Sales Stage	Status	Service Type	Channel	Franchisee Code	Pre Lead Number	LL. Phone Num
1602789686	30/04/2015 17:32:3 xyz		ad3	555	New Lead	Open	New LL connection	SMS		1602181962	

2.5. Lead Creation After Login Through WSC

1. Login through ecustomer login credentials, Under Service, New Service Connection leads to My Lead Details page.
2. Fill in the mandatory details. Click **Submit**.
3. A new record with status as Open is created in My Lead Details page.

The screenshot shows the 'Welcome to BSNL Customer Care Portal' page. At the top, there are navigation links: Home, Service, Offers and Info, FAQs, My Account, Help, Contact Us, and Log Out. Below the header, a message says 'New Connection View:' followed by a link to 'Help'. The main content area is titled 'My Lead Details' and contains the following fields:

Lead Number: 1602336001	Lead Created Date: * 29/04/2015 15:37:04
Account Name: LLBB_NORMAL1	Status: Open
Lead Name: * Sunil_Kumar	Sales Stage: New Lead
Service Type: * New LL connection	Installation Address: * 501
LL Phone Num:	

At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

4. Now based on the address SSA chosen, it will be directly assigned to Sales Lead.
5. Login through the Sales Lead credentials, In his home page, alert will be generated which redirects him to Lead Management Screen > Leads List View.
6. In this case the channel of approach will be WSC.
7. Check feasibility, fill mandatory fields and proceed with the Creation of Order.